

**First Movers Advantage, LLC
Consumer Survey for
Finding A Mover
July 24, 2012**

We have just completed an objective survey of over 100 consumers on the Internet. Our goal was to identify resources that consumers have used in the past, and would use in the future, to find professional movers.

The results are interesting and give insight into resources the moving industry should use when selling to consumers.

We would like to share this survey with you so that you can use it as a resource to evaluate your current marketing efforts. Here are the results:

Have you hired a professional mover in the past?

We received survey responses from 119 people located across the USA. Of those, 45% had used a professional mover in the past and 55% had not.

If the respondent had previously used a mover, we asked:

How did you find that mover?

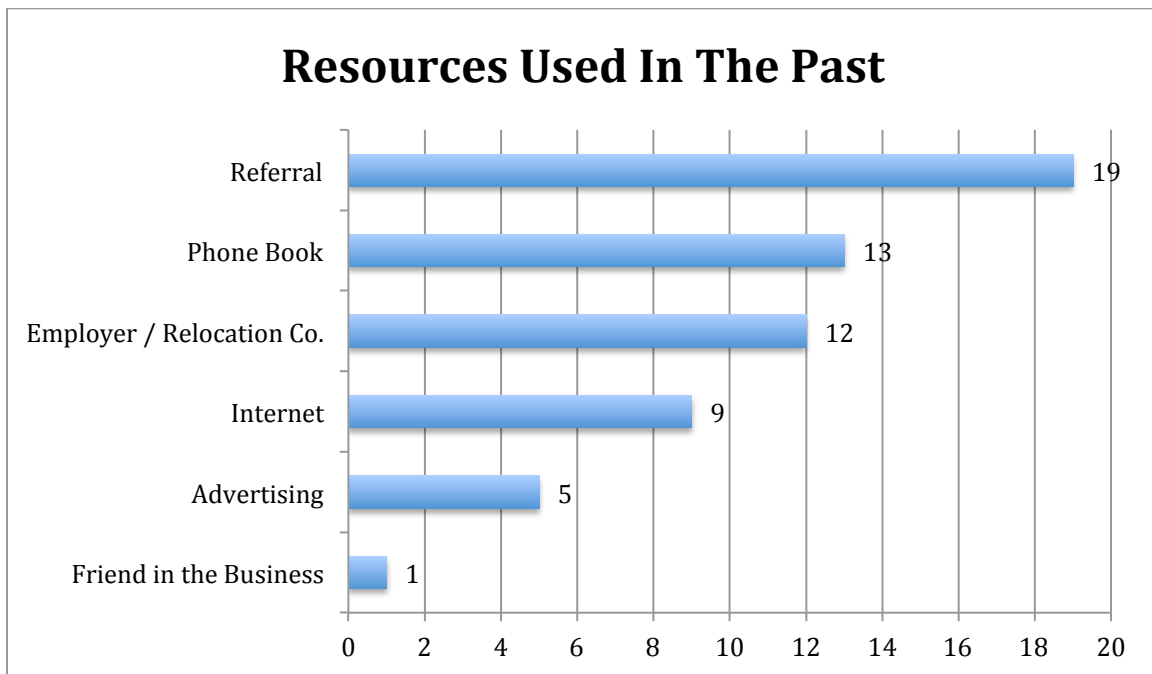


Chart figures indicate the number of people who mentioned each resource.

Most consumers found their mover by referral from someone they know. Referral sources mentioned include: business colleagues, family, friends, and real estate agent.

No specific sites or services were mentioned when people responded with "Internet".

Specific advertising sources mentioned include: newspaper, advertising on truck, and television.

All 119 consumers surveyed were asked to list up to three resources they would use to find a mover in the future. We used an open-ended question so as to not lead the consumers into a particular answer or limit their choices.

Name three resources you would use to find a moving company. Please be specific.

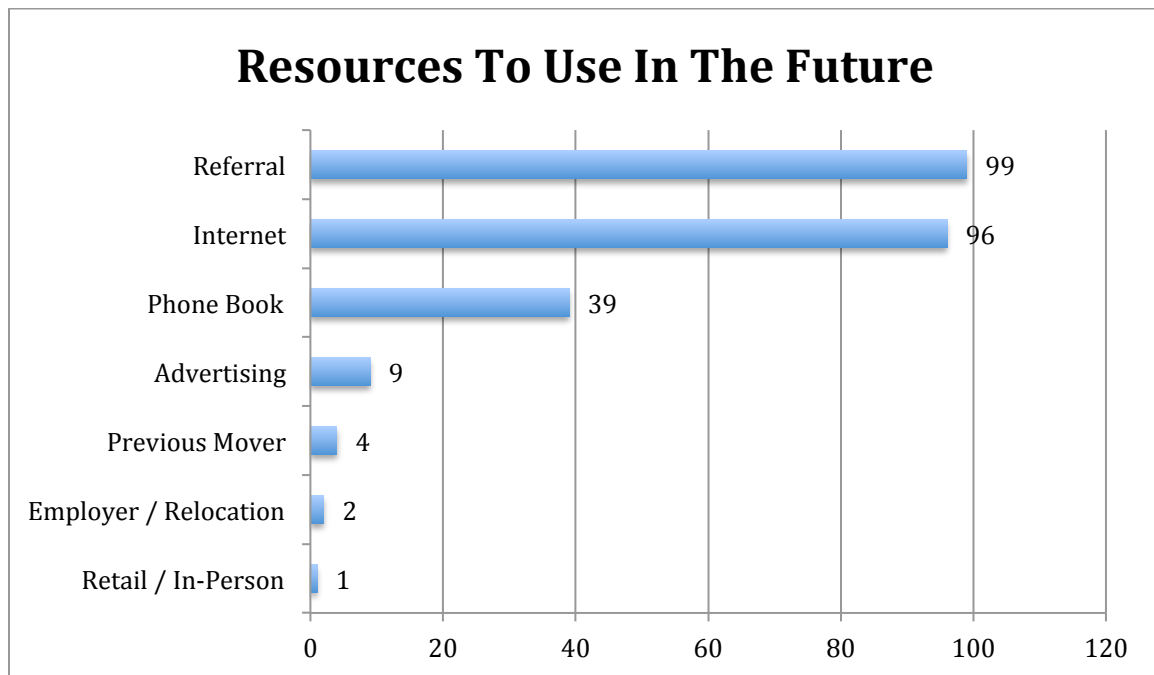


Chart figures indicate the number of people who mentioned each resource.

99 people (**83%**) said they would use referrals from business colleagues, church, Facebook, family, friends, or their real estate agent.

There was a significant increase in the percent of responses mentioning the Internet on this question. Many consumers mentioned "Internet search" or named specific search engines like Google or Yahoo.

Additionally, 32 out of the 96 people (33%) who would use the Internet also mentioned consumer review sites such as Angie’s List, Better Business Bureau (BBB), Consumer Reports, Yelp, or other consumer review sites. Consumer reviews, also known as social proof, are the most powerful influence to hit consumer behavior in a long time. Far from just a trend, “social proof” is the way business is won now, and will only continue to grow in it’s importance to your customer and it’s impact on their buying decisions.

None of the consumers mentioned moving lead aggregation sites like move.com or relocation.com.

Specific advertising sources mentioned include: postcards, newspaper, advertising on truck, and television.

It is interesting to see that very few respondents would call their previous mover. This clearly demonstrates that **customer retention is a significant challenge for the industry.**

What factors would you consider when selecting a mover?

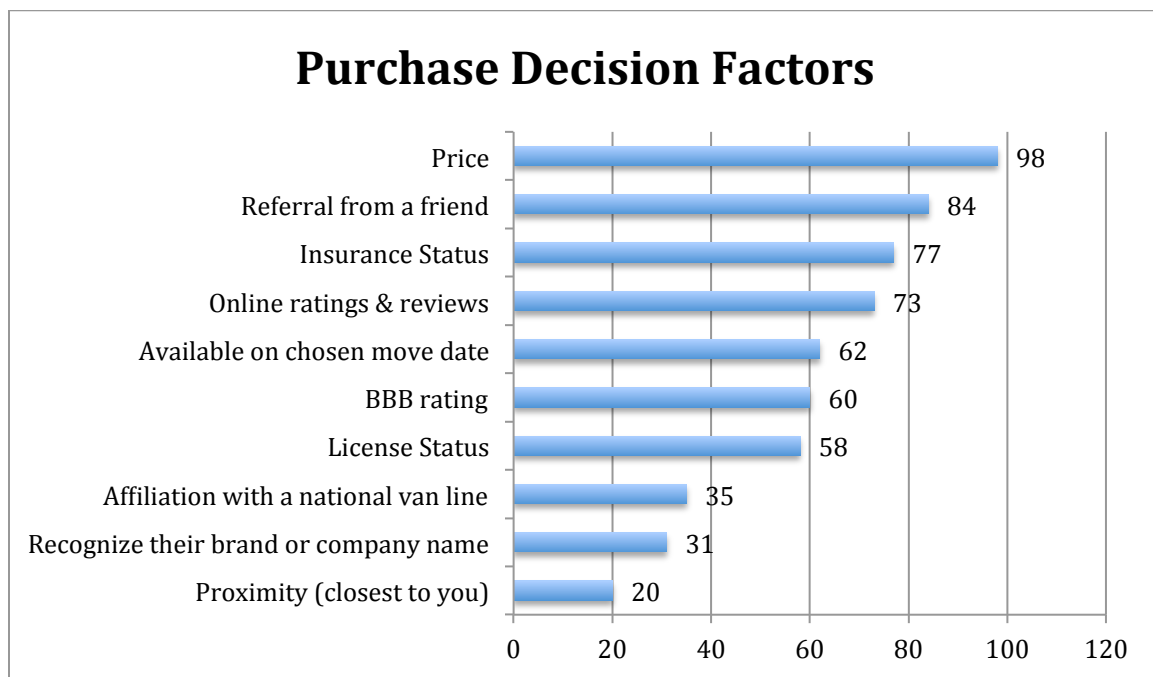


Chart figures indicate the number of people who mentioned each decision factor.

After price, **consumers will also use subjective comments from referrals and online reviews to make a final determination.**

Most Important Resource: Previous Customers!

The survey responses dramatically illustrate the influence held by previous customers:

- 99 people **(83%)** said they would use a referral from someone they know.
- 32 people **(27%)** said they would consider the opinions of strangers by reading consumer review sites on the Internet.
- 4 people **(3%)** said they would call their previous mover for repeat business.

Consumers are unable to 'try out' moving services before purchase, so the testimony of previous customers is a critical factor in winning new business.

The moving industry should view past customers as a significant source of repeat business and referrals. We believe that a greater effort must be made to target this valuable resource. For a mover, marketing after the job is just as important as marketing before the job.

Survey Demographics

All respondents claimed annual income greater than \$60,000.

All respondents were homeowners.

57% of respondents were male and 43% female.

All of the respondents were over 30 years of age. 82% were over 45 years old.

77% of respondents had an associate degree or higher.

Bonus Material

See attached for all the answers to our questions and some additional questions asked in the survey.

Project Details

Survey Title: Finding A Mover

Responses Requested: 100

Date Started: 7/10/12

Date Finished: 7/15/12

Invitations Emailed: 325

Responses Delivered: 115

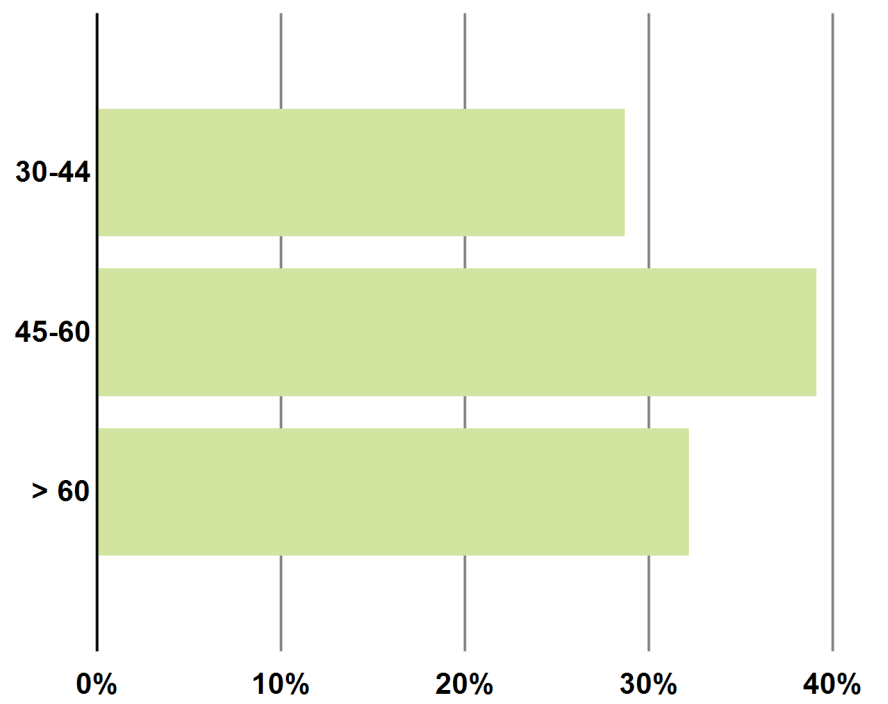
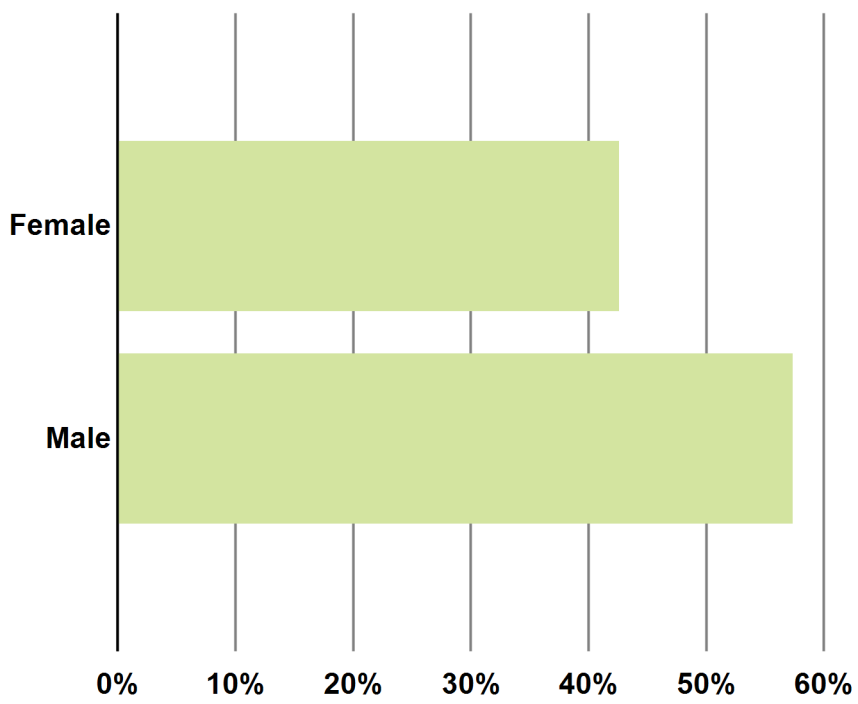
Response Rate: 35%

Targeting Criteria

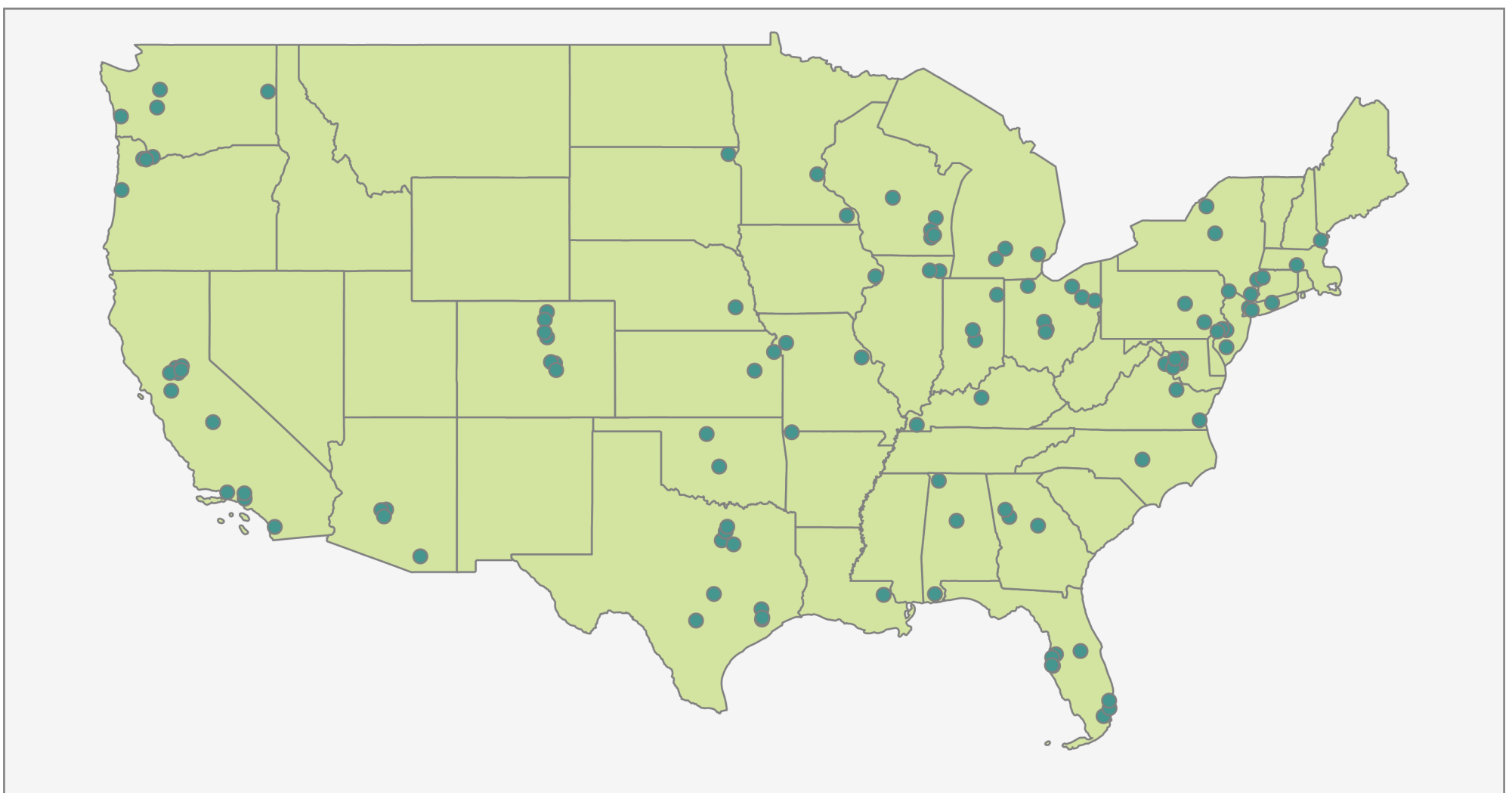
30+ \$60K+ home ownership

Gender


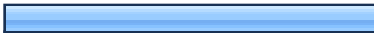
Age



Geography






1. Have you hired a professional mover in the past?

		Response Percent	Response Count
Yes		44.5%	53
No		55.5%	66
answered question			119
skipped question			0






2. If you answered Yes to #1, please tell us how you found that mover. If you answered No to #1, please tell us why you chose to not hire a professional mover.

	Response Count
	68
answered question	68
skipped question	51

3. How likely are you to hire a professional mover in the future?

		Response Percent	Response Count
Highly Likely		32.8%	39
Not Sure		28.6%	34
Not Likely		38.7%	46
answered question			119
skipped question			0



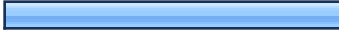







4. How many movers would you talk to before making a decision?

		Response Percent	Response Count
1		10.1%	12
2		26.9%	32
3		57.1%	68
4		4.2%	5
5		1.7%	2
answered question			119
skipped question			0


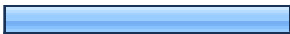
5. Name three resources you would use to find a moving company. Please be specific.

	Response Count
	119
answered question	119
skipped question	0

6. What factors would you consider when selecting a mover?

		Response Percent	Response Count
Affiliation with a national van line		29.4%	35
Available on your chosen move date		52.1%	62
BBB rating		50.4%	60
Insurance Status		64.7%	77
License Status		48.7%	58
Online ratings & reviews		61.3%	73
Price		82.4%	98
Proximity (closest to you)		16.8%	20
Referral from a friend		70.6%	84
You recognize their brand or company name		26.1%	31
	Other (please specify)		4
		answered question	119
		skipped question	0

7. Gender

		Response Percent	Response Count
Male		57.4%	66
Female		42.6%	49
		answered question	115
		skipped question	4

8. Age

		Response Percent	Response Count
< 18		0.0%	0
18-29		0.0%	0
30-44		28.7%	33
45-60		32.2%	37
> 60		39.1%	45
answered question			115
skipped question			4

9. Education

		Response Percent	Response Count
Less than high school degree		0.0%	0
High school degree		6.1%	7
Some college		16.5%	19
Associate or bachelor degree		38.3%	44
Graduate degree		39.1%	45
answered question			115
skipped question			4

Q2. If you answered Yes to #1, please tell us how you found that mover. If you answered No to #1, please tell us why you chose to not hire a professional mover.

1	online research	Jul 15, 2012 2:00 AM
2	Appointed by the govt.	Jul 13, 2012 8:47 AM
3	never moved that far that the services were needed plus have a large family and friend base	Jul 13, 2012 4:27 AM
4	Rented a truck and drove ourselves.	Jul 12, 2012 10:41 AM
5	Online. Small movers	Jul 12, 2012 7:47 AM
6	I do all the moving myself	Jul 11, 2012 11:14 PM
7	I have been military, and have had my moves prepared through military personal property office. However, they use professional movers to do the actual moving.	Jul 11, 2012 10:43 PM
8	yellow pages	Jul 11, 2012 7:14 PM
9	My employer selected the mover.	Jul 11, 2012 6:16 PM
10	phonebook seem reputable	Jul 11, 2012 6:13 PM
11	Newspaper and TV adds	Jul 11, 2012 3:22 PM
12	word-of-mouth	Jul 11, 2012 1:09 PM
13	Phone book	Jul 11, 2012 12:23 PM
14	don't pay for something I can do myself	Jul 11, 2012 9:30 AM
15	Relocation company	Jul 11, 2012 8:29 AM
16	Recommendation from friend	Jul 11, 2012 8:23 AM
17	Less cost to move myself	Jul 11, 2012 7:00 AM
18	Referrals from Realtor	Jul 11, 2012 5:16 AM
19	Recommended by family members.	Jul 11, 2012 5:04 AM
20	recommendation	Jul 10, 2012 8:37 PM
21	I have heard rumors that there is a lot of theft and carelessness with household goods.	Jul 10, 2012 6:52 PM
22	List provided by my employer.	Jul 10, 2012 6:28 PM
23	Online Search	Jul 10, 2012 5:44 PM
24	Yellow pages	Jul 10, 2012 5:30 PM
25	I have only moved 1.	Jul 10, 2012 4:24 PM

Q2. If you answered Yes to #1, please tell us how you found that mover. If you answered No to #1, please tell us why you chose to not hire a professional mover.

26	Never moved our of town and at the time had very few possessions.	Jul 10, 2012 4:10 PM
27	neighbor	Jul 10, 2012 3:24 PM
28	personal reference	Jul 10, 2012 3:05 PM
29	reccomendation	Jul 10, 2012 1:43 PM
30	Have not moved	Jul 10, 2012 1:35 PM
31	recomendation	Jul 10, 2012 1:29 PM
32	Recommendation from friends	Jul 10, 2012 1:08 PM
33	Word of mouth	Jul 10, 2012 12:19 PM
34	Prices seem a little too high or recommendations from previous clients/reviews have been unfavorable. That and I can generally move my things by myself for the most part.	Jul 10, 2012 12:17 PM
35	One of my relatives work for the moving company for over 30 years	Jul 10, 2012 11:42 AM
36	Recommendation from friends	Jul 10, 2012 11:08 AM
37	Recommendations from others currently moving; phone book; internet research	Jul 10, 2012 9:27 AM
38	Web search and recommendations.	Jul 10, 2012 9:23 AM
39	Company provided.	Jul 10, 2012 9:17 AM
40	familiar namegot from advertising	Jul 10, 2012 8:26 AM
41	yellow pages	Jul 10, 2012 8:25 AM
42	Internet	Jul 10, 2012 7:59 AM
43	Too expensive	Jul 10, 2012 7:55 AM
44	We got quotes form several moving companies that we found in the phone book	Jul 10, 2012 7:36 AM
45	List provided by US Army	Jul 10, 2012 7:34 AM
46	From Internet, but I've also consider friends recommandation	Jul 10, 2012 7:31 AM
47	Yellow Pages	Jul 10, 2012 7:24 AM
48	Have never had the need.	Jul 10, 2012 7:24 AM
49	On-Line search	Jul 10, 2012 7:21 AM
50	Newspaper ad.	Jul 10, 2012 7:20 AM
51	cheaper to move self	Jul 10, 2012 7:17 AM

Q2. If you answered Yes to #1, please tell us how you found that mover. If you answered No to #1, please tell us why you chose to not hire a professional mover.

52	Name on truck, reputation, recommendations of friends	Jul 10, 2012 7:17 AM
53	phone book	Jul 10, 2012 7:16 AM
54	Recommendation of previous user.	Jul 10, 2012 7:08 AM
55	Corporate Move	Jul 10, 2012 7:04 AM
56	yellow pages	Jul 10, 2012 7:01 AM
57	reference by a relocation program	Jul 10, 2012 7:00 AM
58	Arranged for by company	Jul 10, 2012 7:00 AM
59	through a friend	Jul 10, 2012 6:58 AM
60	through company i worked for	Jul 10, 2012 6:58 AM
61	I've been able to do it myself. Lack of trust in movers. Far too many stories of inaccurate estimates, belongings held hostage, etc.	Jul 10, 2012 6:52 AM
62	Recommendation from real estate agent.	Jul 10, 2012 6:50 AM
63	expensive, reputation for stealing, breakage, etc.	Jul 10, 2012 6:44 AM
64	company provided	Jul 10, 2012 6:37 AM
65	Phone Book	Jul 10, 2012 6:35 AM
66	used mover voted #1 in Boulder	Jul 8, 2012 10:08 AM
67	Internet search and phone book (6 years ago) I wanted a major van line for an interstate move.	Jul 7, 2012 9:12 AM
68	yellow pages ad for mover seen frequently in local area	Jul 6, 2012 7:25 PM

Q5. Name three resources you would use to find a moving company. Please be specific.

1	Angies List Co-worker referrals Online customer reviews	Jul 15, 2012 2:00 AM
2	internet/yellow pages/friend referral	Jul 14, 2012 9:04 PM
3	yellow pages, neighbors, newspaper ads	Jul 13, 2012 11:52 PM
4	Internet, friends, Angie's list.	Jul 13, 2012 2:16 PM
5	internet friends pricing	Jul 13, 2012 11:22 AM
6	Military transportation of household goods specialists.	Jul 13, 2012 8:47 AM
7	Word of mouth Internet	Jul 13, 2012 7:32 AM
8	Angie's list, internet, word of mouth	Jul 13, 2012 6:37 AM
9	word of mouth yellowpages internet	Jul 13, 2012 4:27 AM
10	Better Business Bureau Customer ratings on mover's website Word of mouth from friends or relatives	Jul 12, 2012 10:41 AM
11	internet word of mouth	Jul 12, 2012 9:07 AM
12	Online. Referral from a friend. Better Business Bureau.	Jul 12, 2012 7:47 AM
13	...	Jul 12, 2012 6:25 AM
14	newspaper,family,word of mouth	Jul 12, 2012 5:34 AM
15	Internet,	Jul 11, 2012 11:14 PM
16	Internet- Use a search engine such as Google to search based on service desired: local, national; search based on reviews. Acquaintances- ask who has used a professional moving company, and who they would recommend. Yellow Pages.	Jul 11, 2012 10:43 PM
17	phone book friends and web	Jul 11, 2012 8:49 PM
18	internet, better business bureau, yellow pages	Jul 11, 2012 7:14 PM
19	Web search engines, referrals from friends, Better Business Bureau.	Jul 11, 2012 6:19 PM
20	internet phone book friends	Jul 11, 2012 6:16 PM
21	online	Jul 11, 2012 6:13 PM
22	Friends Better Business Bureau	Jul 11, 2012 5:57 PM
23	Newspaper, TV, word of mouth.	Jul 11, 2012 3:22 PM
24	website friends phone book	Jul 11, 2012 2:48 PM
25	word-of-mouth advertising	Jul 11, 2012 1:09 PM

Q5. Name three resources you would use to find a moving company. Please be specific.

26	better business burel. friends. internet	Jul 11, 2012 12:27 PM
27	Internet--google Phone book Ask a friend	Jul 11, 2012 12:23 PM
28	friend family co-worker	Jul 11, 2012 9:30 AM
29	friends, yellow pages, internet	Jul 11, 2012 9:29 AM
30	Would use the group I used before	Jul 11, 2012 8:29 AM
31	Consumer Checkbook, Angie's List, Internet reviews	Jul 11, 2012 8:23 AM
32	Internet search Friends Coworkers	Jul 11, 2012 7:00 AM
33	google Yelp	Jul 11, 2012 5:40 AM
34	Realtor, Neighbors, Internet	Jul 11, 2012 5:16 AM
35	phone book yellow pages internet word of mouth recommendations	Jul 11, 2012 5:04 AM
36	Friend Friend Friend	Jul 10, 2012 9:33 PM
37	friends, reputation from yrs in business, google search	Jul 10, 2012 8:37 PM
38	USAA, friends recommendations, web site research	Jul 10, 2012 7:23 PM
39	the better business bureau, angieslist.com, and google.com	Jul 10, 2012 6:52 PM
40	Internet, word of mouth, yellow pages	Jul 10, 2012 6:28 PM
41	not sure	Jul 10, 2012 5:49 PM
42	Online Search Friends who have moved Neighbors who know people in the area	Jul 10, 2012 5:44 PM
43	Friends, family and Angies List	Jul 10, 2012 5:40 PM
44	Yelp, BBB, colleagues	Jul 10, 2012 5:30 PM
45	online	Jul 10, 2012 4:54 PM
46	Ask friends. Internet. Yp	Jul 10, 2012 4:24 PM
47	Internet search Local Chamber of Commerce Real Estate business	Jul 10, 2012 4:10 PM
48	Internet Yellow Pages	Jul 10, 2012 3:51 PM
49	satisfisied neighbors, yellow pages.	Jul 10, 2012 3:24 PM
50	personal reference craigslist	Jul 10, 2012 3:05 PM
51	Online search. Online reviews from other customers. Word of mouth.	Jul 10, 2012 2:39 PM
52	yellow pages,online,other people	Jul 10, 2012 2:10 PM

Q5. Name three resources you would use to find a moving company. Please be specific.

53	Yellow pages Friends recommendations	Jul 10, 2012 2:02 PM
54	friends internet building superintendent	Jul 10, 2012 1:43 PM
55	Ask friends Look at ads Conversation with movers	Jul 10, 2012 1:35 PM
56	on line friend reference blog	Jul 10, 2012 1:29 PM
57	google, friends, angies list	Jul 10, 2012 1:12 PM
58	Friends, internet, yellow pages	Jul 10, 2012 1:08 PM
59	phone book, online, referral	Jul 10, 2012 12:21 PM
60	yellow pages, internet, friends	Jul 10, 2012 12:19 PM
61	YellowPages Google Search Variety of online forums or customer reviews	Jul 10, 2012 12:17 PM
62	Talk to frinds, co workers, business contacts	Jul 10, 2012 11:42 AM
63	Local list serve, Internet, recommendations from friends	Jul 10, 2012 11:08 AM
64	internet referral from friends stop in and ask	Jul 10, 2012 10:56 AM
65	Friends/family, website, local Chamber of Commerce	Jul 10, 2012 10:56 AM
66	Internet (google), ask friends, check licensing	Jul 10, 2012 9:49 AM
67	Work place contract with a moving company, references from friends, internet information and pricing	Jul 10, 2012 9:35 AM
68	word of mouth, phone book, internet	Jul 10, 2012 9:27 AM
69	google.com angie's list friends	Jul 10, 2012 9:23 AM
70	Internet, yellow pages, friends	Jul 10, 2012 9:17 AM
71	realtor, friend, colleuge	Jul 10, 2012 9:11 AM
72	Internet Friends recommendations Yellow pages	Jul 10, 2012 8:58 AM
73	Internet Recommendations from friends Newspaper Ads	Jul 10, 2012 8:31 AM
74	yellow pages, google, references	Jul 10, 2012 8:26 AM
75	yellow pages, word of mouth, TV advertising	Jul 10, 2012 8:25 AM
76	Internet, friends, bbb	Jul 10, 2012 8:15 AM
77	Yellow pages, friends, family.	Jul 10, 2012 8:10 AM
78	Online reviews, friends experience, price	Jul 10, 2012 7:59 AM
79	just use a search engine like google then check those against review sites	Jul 10, 2012 7:55 AM

Q5. Name three resources you would use to find a moving company. Please be specific.

80	referral on line	Jul 10, 2012 7:52 AM
81	Internet phone book friends that recently moved	Jul 10, 2012 7:50 AM
82	Internet, word of mouth, Angie's List	Jul 10, 2012 7:49 AM
83	Internet search for local moving companies, recommendation from someone who we know moved recently, not sure of a third	Jul 10, 2012 7:36 AM
84	Colleagues, internet search, cranial historical reference material	Jul 10, 2012 7:34 AM
85	Internet, Yellow pages, people I know that moved in the past.	Jul 10, 2012 7:31 AM
86	Internet,friends,phonebook	Jul 10, 2012 7:24 AM
87	White Pages online, Google, friends recommendations	Jul 10, 2012 7:24 AM
88	Brother, sister, cousin - have all used them	Jul 10, 2012 7:24 AM
89	Chamber of Commerce Facebook friends google	Jul 10, 2012 7:24 AM
90	Internet, referrals	Jul 10, 2012 7:23 AM
91	Referrals, google search, websites	Jul 10, 2012 7:21 AM
92	Internet Tv Newspaper	Jul 10, 2012 7:20 AM
93	Not sure, have not needed to move in a while.	Jul 10, 2012 7:20 AM
94	friends internet yellow pages	Jul 10, 2012 7:17 AM
95	Internet search, online reviews, recommendation of friends	Jul 10, 2012 7:17 AM
96	phone book inter net search inquiries to friends	Jul 10, 2012 7:16 AM
97	Friends and Family Yellow Pages Internet	Jul 10, 2012 7:13 AM
98	Yellow pages, friends recommendations, on-line search.	Jul 10, 2012 7:08 AM
99	A friend/referral BBB ratings Phone book	Jul 10, 2012 7:05 AM
100	word of mouth, angies list, google	Jul 10, 2012 7:04 AM
101	????	Jul 10, 2012 7:03 AM
102	We have been in our current home for 18 years and have no plans to leave any time soon. When we moved here, my company handled the contract with the moving company. We last hired professional movers in 1988; back then, we looked through the yellow pages, made phone calls, and got estimates. Now you can probably do all that online.	Jul 10, 2012 7:01 AM
103	references, church and internet	Jul 10, 2012 7:00 AM
104	Online; local referral	Jul 10, 2012 7:00 AM

Q5. Name three resources you would use to find a moving company. Please be specific.

105	friends web sites yellow pages	Jul 10, 2012 6:58 AM
106	web referrals from friends	Jul 10, 2012 6:58 AM
107	internet Consumer Report recommendations from friends	Jul 10, 2012 6:55 AM
108	Angies List, reviews on internet, BBB	Jul 10, 2012 6:52 AM
109	Past experience with moving company. Recommendations from real estate agent. Yellow pages to select at least two movers for quotes.	Jul 10, 2012 6:50 AM
110	internet Yahoo, internet YPages and friends	Jul 10, 2012 6:44 AM
111	personal recommendation, consumer reports, internet	Jul 10, 2012 6:44 AM
112	google around me app	Jul 10, 2012 6:39 AM
113	internet, friends, yellow pages	Jul 10, 2012 6:37 AM
114	internet, word of mouth, experience	Jul 10, 2012 6:37 AM
115	Web referral from friend reviews from the web	Jul 10, 2012 6:35 AM
116	best of boulder, personal recommendation	Jul 8, 2012 10:08 AM
117	friend referrals internet search - BBB real estate agent	Jul 7, 2012 9:12 AM
118	web referrals from friends post cards from moving companies	Jul 6, 2012 9:12 PM
119	internet search for local companies search for company reviews by consumers friend's referrals	Jul 6, 2012 7:25 PM

Q6. What factors would you consider when selecting a mover?

1	Appointed by govt.	Jul 13, 2012 8:47 AM
2	I would make sure I had in writing exactly when they would be there and exactly how long they would hold my furniture.	Jul 11, 2012 5:04 AM
3	referral from real estate agent.	Jul 10, 2012 6:50 AM
4	The representative that comes out/customer service; how detailed the company is with their estimate	Jul 7, 2012 9:12 AM